



**TrackOne - Technical Guidance Bulletin
TTGB – 2006-15**

TO: Regional Operators
Indianapolis Private Industry Council
Regional Coordinators

FROM: William R. Miller
Director, Career Services

DATE: January 4, 2007

SUBJECT: Case Notes and Service Notes in TrackOne

Purpose

The Indiana Department of Workforce Development procured an electronic case management system for the delivery of workforce development services effective July 1, 2006. The system was operational on July 1, 2006 for the Workforce Investment Act (WIA) and Trade Adjustment Assistance (TAA) funding sources. The system will become operational for the Wagner-Peyser and Veterans programs in 2007.

The purpose of this bulletin is to distinguish between Service Notes and Case Notes entered in to TrackOne.

Content

The Service Note is a field located on the Services screen. It is a 254 character restricted field designed to allow a case manager to record brief notes about the particular service record. It is NOT intended to replace a formal Case Note. The Service Note field is an OPTIONAL field. That is, Case Managers are not required to enter any information in that field unless required to do so by local policy.

The Case Note screen is the place where Case Managers document the services they deliver to the client, justify services provided and funds expended (supportive service funds, training funds, etc.). Case Notes are REQUIRED. It is expected that Case Managers write detailed Case Notes to support their work with clients. These Case Notes should be consistent with best practices in case notation as defined by local areas. They should include the “who, what, where, when, why and how” of the service/activity. Case notes should NOT include references to PMIS codes. These codes are no longer utilized and create confusion for case note reviewers not familiar with the old PMIS code system.

Case Notes are subject to Monitoring and Data Validation processes. Service Notes are reviewed optionally when Case Notes do not adequately support service delivery. In other words, Service Notes are not normally reviewed during a Monitoring or Data Validation process but may be reviewed when Case Notes documentation is insufficient.

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2006-15	Case Notes and Service Notes in TrackOne
2006-14	Change to TTGB 2006-13, Entitled “Dual Data System Usage”
2006-13	Dual Data System Usage
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2006-11	Obligation Tracking in TrackOne
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2006-08	WIA Tier Progression Documentation Requirements for TrackOne
2006-07	New Enrollments into TrackOne
2006-06	Clarifications and Additions to TTGB 2006-04 Entitled “Case Management System Usage”
2006-05	Data Correction Protocol
2006-04	Case Management System Usage
2006-03	Allowing Log on Capabilities for Case Managers Providing Services at Multiple Locations within One Region
2006-02	To Establish the Procedure for Removing Former Employees’ Password Rights to the TrackOne Case Management System
2006-01	Youth Testing Requirements (Out-of-School)